

Volunteer Quality Alert 2006-06 – Filing Season Reminders (REVISED)

March 24, 2006

Please share this message with all VITA and TCE (non-AARP) Volunteers immediately.

FOR AARP PROCEDURES, PLEASE REFER TO CYBER TAX 2006-029 - VOLUNTEER QUALITY ALERT - FILING SEASON REMINDERS ISSUED FRIDAY, MARCH 17, 2006, FROM BONNIE SPEEDY, NATIONAL DIRECTOR, AARP TAX-AIDE.

Believe it or not there is less than one month to go in the 2006 Filing Season! As we round third base, here are some filing season reminders for all VITA and TCE (non-AARP) Site Coordinators and Volunteers.

VITA and TCE (non-AARP) Sites ONLY

Form 13715, Site Information Sheet - If you change your sites days and/or hours of operation be sure to notify your SPEC Relationship Manager of the change as soon as possible.

Form 13206, Volunteer Assistance Summary Report - All volunteers who work at a volunteer tax preparation site in 2006 must be reported on Form 13206. Volunteers should only be reported once and should include Site Coordinators, Tax Preparers, Quality Reviewers, Screeners and Greeters.

Form 13614, Interview and Intake Sheet (or Partner created Interview and Intake Sheet) - If you are retaining Forms 13614 to help with the processing of this year's tax return, retain electronic tax return information for subsequent return preparation or retain taxpayer information for the purpose of mailing information on products or services, the form must be signed by the taxpayer and retained at the site.

Site Identification Number (SIDN) - All tax returns must have a SIDN. Please check computer defaults periodically to ensure the correct SIDN is on all electronic returns prepared at your site. Additionally, please ensure the correct SIDN is on all paper tax returns prepared.

Forms 8453, U.S. Individual Income Tax Declaration for an IRS e-file Return - Mail a copy of all your Forms 8453 to the appropriate IRS campus (using labels supplied by local SPEC office) within three business days of receiving an IRS acknowledgement. Mail one copy to your local IRS SPEC office along with the Forms W-2, W-2-G, 1099-R, and/or 2848. This copy can be retained at the site if space permits. Remember, forms must be kept in a secured area.

Document Control Number (DCN) - All Forms 8453 must have a DCN. To avoid missing DCNs, create the e-file before printing the Form 8453. If the e-file is created after printing, you must handwrite the DCN on the form prior to sending to the IRS campus and SPEC office.

Form 8879, IRS e-file Signature Authorization - All Forms 8879 must be sent to your local SPEC office during the site closing process along with Forms W-2, W-2G, 1099-R, and/or 2848.

For a training refresher, Volunteers can go to ...

- Volunteer Quality Alerts on the IRS website <http://www.irs.gov>. Enter the Keyword *Community Network*, scroll down to Partner Products and Volunteer Resource Center or go to <http://www.irs.gov/individuals/article/0,,id=120856,00.html>
- Pub 3189, Volunteer e-file Administrators Guide
- Publication 1084, IRS Volunteer Site Coordinator's Handbook